



## **Future of the Irish Defense Industry – Market Attractiveness, Competitive Landscape and Forecasts to 2018**



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## **Synopsis**

This report is the result of SDI's extensive market and company research covering the Irish defense industry, and provides detailed analysis of both historic and forecast defense industry values including key growth stimulators, analysis of the leading companies in the industry, and key news.

## **Introduction and Landscape**

### **Why was the report written?**

The Future of the [Irish Defense Industry](#) - Market Attractiveness, Competitive Landscape and Forecasts to 2018 offers the reader an insight into the market opportunities and entry strategies adopted by foreign original equipment manufacturers (OEMs) to gain a market share in the Irish defense industry.

### **What is the current market landscape and what is changing?**

Irish defense expenditure registered a CAGR of -5.08% during the review period and values US\$1.18 billion in 2013. The focus of the Irish government will be on participation in peacekeeping and crisis management operations.

### **What are the key drivers behind recent market changes?**

Modernization of its armed forces, participation in peacekeeping operations, and crisis management operations.

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## **Key Features and benefits**

- ❑ The report provides detailed analysis of the current industry size and growth expectations from 2014 to 2018, including highlights of key growth stimulators, and also benchmarks the industry against key global markets and provides a detailed understanding of emerging opportunities in specific areas.
- ❑ The report includes trend analysis of imports and exports, together with their implications and impact on the Irish defense industry.
- ❑ The report covers five forces analysis to identify various power centers in the industry and how these are expected to develop in the future.
- ❑ The report allows readers to identify possible ways to enter the market, together with detailed descriptions of how existing companies have entered the market, including key contracts, alliances, and strategic initiatives.
- ❑ The report helps the reader to understand the competitive landscape of the defense industry in Ireland. It provides an overview of key defense companies, both domestic and foreign, together with insights such as key alliances, strategic initiatives, and a brief financial analysis.

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## **Key Market Issues**

❑ In 2013, Ireland registered a defense budget of US\$1.2 billion and invested just 0.5% of its GDP in defense; this is minute in comparison with the UK and France, which spend 2.2% and 1.9% of their GDP on defense respectively. The small defense budget of the country results in a reduced capital expenditure allocation, which further effects in the purchase of equipment and hi-tech arms and ammunition. Consequently, Ireland's relatively small defense budget has become a barrier to entry for foreign companies, despite the country maintaining an open economy.

❑ Ireland is a member of the EDA, which was formed to improve European defense capabilities and to create a single defense equipment market; consequently, the Irish government gives preference to European countries for the import of defense equipment. The EDA code of conduct for defense procurement requires all member countries to post all new defense contract opportunities on the Electronic Bulletin Board (EBB), which allows all member countries to become aware of defense requirements in one place. In addition to this, in order to develop the European defense equipment market, the EU issued a directive in 2009 that simplified the terms and conditions of transfers of defense products within the EU, and coordinated procedures for the award of defense contracts, and as a result, the Irish government's preference for European companies for the import of defense equipment acts as a barrier for entry into the Irish defense market for non-EU countries.

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## **Key Highlights**

❑ Irish defense forces are involved in a number of overseas peacekeeping missions, which include UN Mission for the Referendum in Western Sahara (MINURSO), UN Observer Mission in Congo (MONUC), EU Training Mission Somalia (EUTM), International Security Assistance Force (ISAF) in Asia, EU Stabilization Force (EUFOR/SFOR) and Kosovo Force (KFOR), UN Truce Supervision Organization (UNTSO), UN Interim Force Lebanon (UNIFIL), and the Department of Peacekeeping Operations (DPKO) in the Middle East. Ireland deploys 97 military personnel in peacekeeping operations, out of which, 56 personnel are committed to missions in Bosnia and Kosovo.

❑ Cybercrime: Cybercrime is seen as a major threat to internal security by the Irish government. According to the cybercrime survey conducted by the Irish Information Systems Security Association (ISSA), Irish organizations face cybercrime incidents from malicious software and phishing attempts. In addition to this, the theft of sensitive IT assets is on a significant increase, and in 2007, 49% of the 61 Irish organizations surveyed reported asset thefts. Due to the increasing threat of cybercrime against Ireland's internal security, cyber security is expected to be a factor behind the Irish HLS budget during the forecast period, as despite budget constraints, the Irish Department of Justice and Equality remains committed to countering cybercrime.

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